DOCUMENT RESUME

ED 155 467 CE 016 978

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TITLE	Coordinating and Performing Activities for Employer. Preparing Employer Itineraries, Student Manual and Teacher's Manual.
INSTITUTION	Clemson Univ., S.C. Vocational Education Media Center.
SPONS AGENCY	South Carolina State Dept. of Education, Columbia. Office of Vocational Education.
PUB DATE	77
NOTE	12p.; For related documents see CE 014 491 and CE 016 911-989
AVAILABLE FROM	Vocational Education Media Center, 10 Tillman Hall, Clemson University, Clemson, South Carolina 29631 ($160.00 for complete set, including nineteen filmstrips and eight overhead transparencies)
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	Behavioral Objectives; Business Education; Business Skills; Instructional Materials; *Office Occupations Education; Performance Based Education; *Scheduling; *Travel
IDENTIFIERS	Vocational Technical Education Consortium States

ABSTRACT

Supporting performance objective 12 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on scheduling employer's trips are included in this packet. (The packet is the second in a set of four on coordinating and performing activities for the employer--CE 016 977-980.) The student materials include instructions and materials needed to prepare an itinerary and to schedule travel arrangements for a business trip. The instructor's final checklist is also included. The instructor's manual includes instructions for the teacher, a guideline for making a travel project, and suggested references. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the four packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

PREPARING EMPLOYER ITINERARIES

STUDENT MANUAL

Materials in this Lesson
have been

Modified by
Maleeta M. Jones

from
Materials Developed and Graciously Provided by
Bureau of Vocational Education, State Department of Education
and
Department of Vocational Education
College of Education, University of Kentucky

These materials support
Performance Objective 12 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

1977

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PREPARING EMPLOYER ITINERARIES

INTRODUCTION

Many businesspeople are required to travel as part of their work. Some may travel regularly and some may travel only occasionally.

When called out of town, your boss may ask you to make the travel arrangements and prepare an itinerary for the trip.

An itinerary is a day-by-day schedule of events your employer is to engage in while away. In this unit, you will learn to prepare an itinerary and make travel arrangements for your employer.

DIRECTIONS

Before starting this unit, be sure you have reviewed the unit on typing itineraries and making travel arrangements. If you feel you are ready to perform this task after reading the objective below, arrange with your instructor to complete the Check-Out Activities.

or

If you need to complete the learning activities in order to perform this task, read the Learning Activities on page 2, and complete them in sequential order.

OBJECTIVE

Given a case situation in which you are required to plan an itinerary and schedule your employer's trip, prepare the itinerary and make the necessary travel arrangements for a business trip. Your work must be rated acceptable for satisfactory performance.

LEARNING ACTIVITIES

1	PRACTICE making travel arrangements and itinerary by reading Instruction Sheet I, PREPARING AN ITINERARY.
2	CHECK your understanding of preparing itineraries by completing Student Self-Check I.
3	ARRANGE with your instructor to complete this unit by doing the CHECK-OUT ACTIVITY.

Instruction Sheet I

PREPARING AN ITINERARY

When you are asked to make travel arrangements for your employer, it will be necessary that you handle all reservations and prepare an itinerary.

An itinerary is a travel plan in typewritten form. An itinerary is an essential reference for the traveling executive, as it helps keep track of daily activities. You may wish to make a tentative itinerary when your employer first tells you of trip plans, then when all arrangements have been made for the trip, you should type the final copy. Be sure to prepare at least one copy for your own use, and also one copy for retention in the files.

If you are employed by a very large company, the transportation or travel department may relieve the secretary of the time-consuming duties involved in planning a trip. If not, you may wish to consult a travel agency for advice. Travel agencies arrange trips free of charge.

If you are to make all arrangements, there are several resource books that will provide useful information. You may use official travel guides to make transportation arrangements, or you may simply call the local airline, train, and bus companies. Most employers prefer to fly on a long trip although some employers will prefer to rent a car or drive their own.

The Hotel and Motel Red Book will be quite helpful in making lodging reservations.

Your employer may purchase travel insurance for the duration of the trip. Travel insurance may be purchased from vending machines in airport terminals. The employer may prefer to buy an annual travel insurance policy, which covers all business trips; on the other hand, the insurance may be covered by a policy provided as a company benefit.

Be sure to ask for a confirmation of all hotel or motel reservations. If your employer will be arriving late at night, be sure to ask the motel or hotel to "hold for late arrival," since many hotels do not hold reservations after 6 p.m.

You must purchase your employer's travel tickets early in order to insure a seat.

If necessary, refer to a typing or office procedures book to check the necessary form used in preparing an itinerary.

Student Self-Check I

PREPARING AN ITINERARY FOR EMPLOYER

Below is a situation in which you will have to plan an itinerary for a trip your employer is taking. Make the necessary reservations and arrange all the activities into a timetable, then type the itinerary in correct form.

When you have finished, check your itinerary by the example given on the following page. You may use another acceptable format at your instructor's discretion.

Mr. James Bolton, your employer is planning to attend the American Furniture Maker's Convention in Denver, Colorado, on April 23, 24, and 25. Mr. Bolton prefers to travel by plane. He wishes to be in Denver by 1:00 p.m., April 23. You are to make all reservations and travel arrangements for him.

While in Denver, Mr. Bolton wants to meet with his purchasing agent, Mr. John Brown, who will also be in Denver. They have arranged to have lunch together at 1 noon, April 25, at the Denver Inn.

All of Mr. Bolton's meals will be eaten at the convention hotel, the Denver Inn, at 12 noon until 1:00 p.m. and 6:00 until 7:30 p.m.

The meetings Mr. Bolton will attend are to be listed on the back of the convention program, which he will receive when he registers at the convention.

ANSWER TO STUDENT SELF-CHECK I

ITINERARY James Bolton

Denver, April 23-25, 19-

Wednesday, April 23	
6:00 a.m.	Leave Charleston on Eastern Flight No. 269.
7:30 a.m.	Change planes in Atlanta; transfer to Delta Flight No.344.
8:00 a.m.	Depart Atlanta on Delta Flight No. 344.
12:53 p.m.	Arrive in Denver. Accommodations: The Denver Inn. American Furniture Maker's Convention will be held here. Use Airport Limousine Service to transport from airport to hotel.
1:30 p.m.	Check into hotel. Check convention program to see if any afternoon meetings are scheduled.
Thursday, April 24	
8:00 a.m.	Check to see when meetings are scheduled.
12:30 p.m.	Refer to program for schedule of afternoon meetings.
6:00 p.m.	Check to see if any evening meetings are planned.
Friday, April 25	
8:00 a.m.	Check to see when morning meetings are scheduled.
12:00 noon	Luncheon with Mr. John Brown, purchasing agent, in the Denver Inn
2:00 p.m.	Check out of hotel. Leave for airport.
3:00 p.m.	Leave Denver on Delta Flight No. 444, nonstop.
8:00 p.m.	Arrive Charleston.

CHECK-OUT ACTIVITIES

PREPARING EMPLOYER ITINERARIES

The statement below explains the activity you must be able to complete in order to finish this unit. Complete the activity. Your instructor will evaluate your performance by using the Instructor's Checklist, SCHEDULE EMPLOYER'S TRIPS.

Your instructor will provide you the following: airline schedule; hotel/motel guides; and a telephone to make reservations. Make travel arrangements for the case your instructor tells you to complete. Be sure to type an itinerary in either case.

Case No. 1

From the information provided below, prepare an itinerary and make travel arrangements for Ms. Jones.

> Your employer, Ms. Jane Jones is going to take a trip the week of May 6-10. She would like to leave Monday afternoon and return Friday afternoon. She will leave your city and go to Chicago on Monday. Tuesday morning she has a meeting at 9:00 a.m. with Ms. Joan Winters of ILLCO. Ms. Jones will then meet for lunch at the hotel, Mr. Charles Wilson of our Chicago branch office at 1:00 p.m. Late Tuesday afternoon Ms. Jones would like to fly to Minneapolis. All day Wednesday, she will be with Mr. Joe Jackson of our Minneapolis branch. They will meet at 9:00 a.m. Thursday morning she will return to Chicago for a business luncheon with Ms. Winters and the board of directors of the Chicago office. Ms. Jones wants to return home to your city by 3:30 p.m. on Friday.

Case No. 2

> Your employer, Mr. John M. Enis, of the ICCONA Corporation in your city has been asked to be a guest speaker of the International Marketing Association in Las Vegas, Nevada. He prefers to fly and will be staying in the convention center, the Sands Motel. Mr. Enis will leave on Monday and return on Friday. His speech is scheduled for a formal banquet on Tuesday at 7:30 p.m. Make reservations and plan some entertainment for his free time. Mr. Enis will be eating all meals at the convention center; however, he plans to rent a car on Wednesday and drive to Reno to visit his sister. He will return to Las Vegas on Thursday morning as he will be guest of honor at a luncheon at 1:00 p.m. Be sure to include all details in your itinerary, as Mr. Enis tends to be quite forgetful.
>
> When Mr. Enis returns home, you will be responsible for preparing his expense report. His Bank Americard number is 4687 691 017 776.

Student _____

Date _____

PREPARING EMPLOYER ITINERARIES

Instructor's Final Checklist

Check the student's performance in the following elements of preparing employer itineraries.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. Planned itinerary to avoid backtracking	[ ]	[ ]	[ ]	[ ]
2. Planned trip to avoid long layovers	[ ]	[ ]	[ ]	[ ]
3. Planned sufficient time for travel*	[ ]	[ ]	[ ]	[ ]
4. Planned sufficient time for engagements*	[ ]	[ ]	[ ]	[ ]
5. Planned time for meals	[ ]	[ ]	[ ]	[ ]
6. Made travel arrangements, considering employer's preferences	[ ]	[ ]	[ ]	[ ]
7. Made necessary transportation and lodging reservations*	[ ]	[ ]	[ ]	[ ]
8. Confirmed reservations	[ ]	[ ]	[ ]	[ ]
9. Scheduled meetings where appropriate*	[ ]	[ ]	[ ]	[ ]
10. Prepared copy of itinerary for employer and office	[ ]	[ ]	[ ]	[ ]

*Must be rated fully accomplished for satisfactory performance.

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TEACHER'S INSTRUCTIONS

In preparing travel arrangements and itineraries the answers will vary according to transportation facilities in your city and reference materials you have available in your classroom or public library. You are to provide airline schedule, hotel/motel guides, and a telephone to make reservations for completion of Check-Out Activities.

Case No. 1 will show if your students have a working knowledge of the proper planning of trips and preparation of itineraries by their ability to perform this task.

Case No. 2 is a more detailed problem that you may want your "above average" students to do. This case involves the unit relating to the use of maps and/or an atlas when traveling and also the unit related to the preparation of expense reports.

For extra practice you may suggest that your students prepare a travel project to a place that they would be interested in visiting. Or you may choose the country, state, or city on which they are to report. This type of project is particularly interesting to students who may be planning a Senior Trip.

A guideline for making a travel project is included in your manual.

The Instructor's Checklist page 7, is a perishable item and should be duplicated for your use in evaluating each student's performance.

TRAVEL GUIDE PROJECT

I. Write a letter to the Department of Tourism requesting information.

II. Check on inoculations and passport requirements (if necessary).

III. Check on methods of transportation (be sure to include arrival and departure schedules and cost involved).

IV. Check on climate (this will help you decide the type of clothing you need to take).

V. Check on accommodations (this includes hotel/motel location, convenience of nearby restaurants, and cost)

VI. Check on entertainment (be sure to include cost and convenience in traveling to location)

VII. Put report together in orderly fashion. Be sure to use good grammar, punctuation, and spelling. You may include any information you have obtained from a travel agency.

SUGGESTED REFERENCES

Travel Agencies
Airlines
Train Service
Bus Service
Car Rental Agencies
Automobile Clubs

Hotel and Motel Red Book
Mobile Travel Guide
Banks (for information on Travelers' Checks)
Department of Tourism
Maps/Atlas